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**SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING**

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NOTED

**The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.**

- Private Sponsor Certification - Page 1 of 4

9.

**USE ONLY IF YOU CHECKED QUESTION 5(b)**  
 I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

**Score**

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment of the trip (see questions 6 and 10).*

FOR

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10.

**USE ONLY IF YOU CHECKED QUESTION 9(B)**  
**If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:**

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

JFF, Lumina Foundation and The Joyce Foundation select sites and topics around which to base site visits based on the quality of programming and their relationship to education, workforce development and poverty alleviation policy. See attachments for more detail.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:  
See attachments for each sponsor's mission and how the purpose of the trip relates to that mission.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

JFF has previously planned similar trips for over 10 years. Lumina Foundation and The Joyce Foundation recently co-sponsored a similar trip with JFF in August 2018 to Detroit, MI. Prior to August 2018, JFF was the only sponsor. See attachments for more detail.



15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Each sponsor performs additional educational activities outside of sponsoring congressional trips. See attachments for more detail.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$425.00 (see attachments for more detail)	\$121.00 (see attachments for more detail)	\$112.00 (see attachments for more details)	NONE
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

b) The trip involves events that are arranged or organized specifically with regard to Congressional participation.

18. Reason for selecting the location of the event or trip

JFF, Lumina Foundation and The Joyce Foundation selected Memphis, TN due to the city's innovative strategies in addressing education, workforce development and poverty policy. See attachments for detail.

19. Name and location of hotel or other lodging facility:

The Peabody Hotel: 149 Union Ave. Memphis, TN 38103

20. Reason(s) for selecting hotel or other lodging facility:

The hotel is geographically convenient and offers government per diem rates.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging expenses will equal the government per diem rate for Memphis, TN in February. The meal expenses will be less than the government per diem rate for Memphis, TN in February.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round trip coach class commercial airfare will be provided from DC to Memphis. In addition, a chartered bus service is reserved for two days of ground transportation.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

NONE

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Maria K. Shymon

Name and Title: Marla Flynn, President/CEO

Name of Organization: Jobs for the Future (JFF)

Address: 122 C st NW Washington, DC 20001

Telephone Number: 617-728-4446

**Fax Number:**

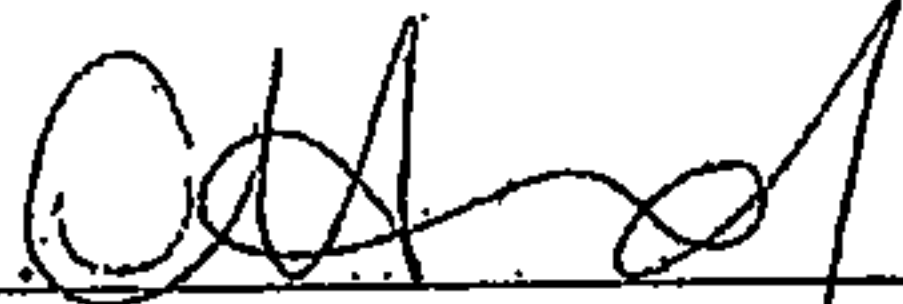
E-mail Address: mflynn@jff.org



PRIVATE SPONSOR TRAVEL CERTIFICATION FORM  
SIGNATURE PAGE FOR ADDITIONAL SPONSOR  
(to be completed by each additional sponsor)

I hereby certify that the information contained on pages 1-4 of the certification form and any  
accompanying addenda, all submitted in connection with the 2/21/2019 - 2/22/2019 trip

to Memphis, TN is true, complete, and correct.  
Place of Travel

Signature of Travel Sponsor: 

Name and Title: Danette Howard, Ph.D., Senior Vice President

Name of Organization: Lumina Foundation

Address: 30 S Meridian St. Suite #700 Indianapolis, IN 46204

Telephone Number: 800-834-5756

Fax Number: \_\_\_\_\_

E-mail Address: dhoward@luminafoundation.org

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**Congressional Staff Network for Economic Advancement**  
**February 21, 2019 - February 22, 2019 Memphis, TN**

**Question #2 Description of the Trip:**

The Congressional Staff Network for Economic Advancement brings together a bicameral, bipartisan group of senior Congressional staff to focus on policy issues at the core of economic mobility: K-12 education, postsecondary education, workforce development, and poverty alleviation. The purpose of this trip is to examine high quality and innovative education and workforce training programs that focus on the economic needs of the city, its employers and its people. Staff will see innovative programs that meet the skill needs of the region's critical industries, talk with students, teachers, state and local officials and employers who are involved in the development and in carrying out these programs.

**Question #5 Senate Staff:**

Adzua Agyapo, Legislative Fellow, Office of Senator Bennet

**Jake Baker, Professional Staff, Senate HELP Committee**

**Kendrick Davis, Policy Advisor, Office of Senator Harris**

**Sam Hatstrup, Legislative Correspondent, Office of Senator Portman**

Rebecca Howard, Legislative Assistant, Office of Senator Jones

**Lot Kwarteng, Legislative Assistant, Office of Senator Stabenow**

Lindsay Linhares, Senior Policy Advisor, Office of Senator Hyde-Smith

**Ryan Martin, Senior Human Services Advisor, Senate Finance Committee**

**Katherine McClelland, Workforce and Education Policy Advisor, Senate HELP Committee**

**Karishma Merchant, Senior Education Policy Advisor, Office of Senator Tim Kaine**

**Marisa Morin, Policy Fellow, Office of Senator Wyden**

**Cortney Segmen, Legislative Correspondent, Office of Senator Kaine**

**Brittany Weaver, Legislative Assistant, Office of Senator Hassan**

**Question #12 Role of Sponsor:**

Jobs for the Future (JFF), Lumina Foundation and The Joyce Foundation work together to select sites and topics of interest around which to base site visits and forums, considering congressional staff interest, the quality of programming, and whether or not these





- identifying innovative solutions and investing in their success. Through this work, The Joyce Foundation: funds organizations that focus on education and economic mobility, convenes coalitions focused on a specific education or workforce strategy and promotes findings through distribution of materials (i.e. policy briefs or reports).

**Question #16 Good Faith Estimates for Senate Staff Travel and Meal Expenses:**

**Transportation:** Round trip coach class commercial airfare from DCA (DC) → MEM (Memphis) = \$350.00 per person. On the ground transportation, via chartered coach class bus service for two days in Memphis = \$75.00 per person. Total transportation expenses = **\$425.00 per person.**

**Lodging:** Lodging at the Peabody Hotel for one night = **\$121.00 per person.**

**Meals:** Meals for two days of travel = **\$112.00 per person**

**Question #18 Reason for Selecting Location:**

The sponsors selected Memphis, Tennessee for this site visit because of its efforts in developing its workforce and preparing its citizens for employment opportunities in high demand industries. Memphis is rebuilding its economy, hoping to engage more of its hardest to serve populations in the local job market. This visit will highlight Memphis' commitment to innovative K-12, post-secondary and workforce models that promote skill development and poverty alleviation. The visit will shed light on implications for K-12, higher education and workforce development policy, specifically on: career pathway approaches and strategies for supporting today's most vulnerable learners.



FOR ECONOMIC ADVANCEMENT

## AGENDA

**Thursday, February 21, 2019 – Friday, February 22, 2019**  
**Site Visit to Memphis, Tennessee**

Thursday February 21<sup>st</sup>

8:50 - 10:31 AM Staff Flies to Memphis TN  
8:50 AM to 10:31 AM American 4483

10:45 – 11:15 AM Transit from Airport to Lunch session  
Central BBQ Downtown Location  
147 E Butler Ave Memphis TN  
38103

11:15 AM      Lunch session  
*Central BBQ Downtown Location*

**11:30 – 1:00 PM      An Introduction to Memphis**

Luncheon speakers will provide an overview of the Memphis region: the economy; its demographic characteristics; its challenges in addressing poverty and equity issues; its education and workforce development efforts; and opportunities that lie ahead. As part of this session, speakers will discuss strategies and changes underway that are designed to ensure that education and workforce development programs meet the skill needs of the region's high demand industry sectors and are accessible to all individuals in the region. This discussion will also focus on the role that federal resources (e.g., TAACCCT, America's Promise grants) have played in helping local stakeholders to rethink workforce development and postsecondary education efforts for the region. Speakers will also provide an overview of the site visit.

**Speakers:**

**Reid Dulberger**, President, EDGE and the Greater Memphis Alliance for a Competitive Workforce (GMAC)

**Dr. Elena Delavega**, Professor, University of Memphis

**Shante Avant**, Chair, Shelby County School Board and Deputy  
& Director, Women's Foundation for a Greater Memphis

**Alan Gumbel**, Interim Executive Director, GMAC

1:00 – 1:30 PM      Travel to Smith & Nephew  
1450 E Brooks Rd, Memphis TN 38116

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## CONGRESSIONAL STAFF NETWORK

FOR ECONOMIC ADVANCEMENT

1:30 – 3:00 PM

### Smith & Nephew – Employer Panel on Regional Investment, Sector Initiatives and Tour of Medical Device Manufacturer

During this session staff will tour the Smith and Nephew medical device company – an advanced manufacturing company that represents the region's leading manufacturing industry, medical device manufacturing. After a 30 minute tour where staff will have opportunities to talk with workers and see the facility, they will hear from an employer panel with representatives from Smith & Nephew, The Bartlett Chamber and the Medical Device Council to hear about how regional employers are investing in the region's workforce and engaging in sector initiatives to build skilled worker pipelines in the region's key industry sectors. Smith & Nephew will discuss their involvement in the local medical device council (a regional sector partnership) and about how the America's promise grant program (a federal DOL grant) has positively impacted these efforts.

#### Speakers:

**Gene Baker**, Vice President of Operations, Smith & Nephew  
**John Threadgill**, President, Bartlett Chamber of Commerce  
**Roy Smith**, President, Memphis Medical Device Council  
**Willis Yates**, President, Y & M Technologies

3:00 – 3:30 PM

Travel to Civil Rights Museum  
*450 Mulberry St. Memphis, TN 38103*

3:30 – 5:00 PM

### The Role that the Civil Rights Movement has Played in Memphis

The city of Memphis has played a pivotal role in the U.S. civil rights movement. This session taking place at the museum will discuss how the civil rights movement impacted Memphis, from its history and economy into today. From the thriving neighborhood of Old Beale Street, to the U.S. Civil Rights Museum, the location of the assassination of Dr. Martin Luther King Jr. in 1968, Memphis has played a big role in American history. While great strides have been made in the city, efforts continue to focus on equitable access to good jobs and economic prosperity through the region's education, workforce, poverty alleviation, and economic development efforts.

#### Speakers:

**Ryan Jones**, Museum Educator, National Civil Rights Museum  
**Dory Lerner**, Museum Educator, National Civil Rights Museum

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## CONGRESSIONAL STAFF NETWORK

FOR ECONOMIC ADVANCEMENT

5:00 – 5:30 PM Travel back to hotel & Check - in  
*The Peabody Hotel*  
149 Union Ave. Memphis, TN 38103

7:00 – 8:30 PM Dinner Session on State Initiatives  
*The Peabody Hotel*  
149 Union Ave. Memphis, TN 38103

Staff will hear from regional representatives from Pathways TN, TN Promise, and TN Reconnect on how state initiatives are being implemented in Memphis. This conversation will include information on funding streams and outcomes these programs have seen on a regional and state level from their work.

### Speakers:

**Dr. Robin Cole**, Dean of Department of Business & Technology, Southwest Tennessee Community College  
**Roland Rayner**, President, Tennessee College of Applied Technology (TCAT)  
**Jerre Maynor**, Director of Student Readiness and Pathways, The Broad Center  
**Rep. Mark White**, Chair of House Education Committee, TN House District 83  
**Rep. Karen Camper**, Leader of House Democratic Caucus, TN House District 87

8:30 PM Programming ends

Friday February 22<sup>nd</sup>

8:00 – 8:30 AM Check Out of Hotel

8:30 – 9:30 AM Breakfast Session: A conversation with city and county Mayors  
*The Peabody Hotel*  
149 Union Ave. Memphis, TN 38103

### Speakers:

- **Mayor Lee Harris**, Shelby County
- **Mayor Jim Strickland**, Memphis

The breakfast meeting will focus on how city and county governments work together to solve challenges facing the region, and the roles that education and workforce development play in building the regional economy as well as providing economic opportunities (ensuring equity) for all residents of Memphis and Shelby County. Mayor Harris will provide an update on the status

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of the Shelby County workforce development system as it transitions to a regional workforce system.

9:30 – 10:15 AM    Hope 6 Neighborhood Tour  
*Clayborn Temple*  
*294 Hernando St. Memphis, TN 38126*

This session will focus on neighborhood redevelopment, inclusion and equity. Staff will be driven through a local Hope 6 Neighborhood and hear about work the Memphis Housing authority is doing as a result of their Federal Job Plus Grant and their Choice Neighborhood grant.

Speakers:

**Marcia Lewis**, Director, Memphis Housing Authority  
**Paul Young**, Director of Housing and Community Development, City of Memphis

10:15 – 11:45 AM    Addressing Poverty and Better Serving Special Populations  
*Clayborn Temple*  
*294 Hernando St. Memphis, TN 38126*

During this session staff will hear from local non-profits, philanthropic organizations, and the local workforce board (WIN) who are working on varied poverty alleviation efforts including workforce development, adult education, opportunity youth, and reentry programs. Staff will hear about efforts to prepare targeted populations for success in the local labor market and strategies to provide access to high demand opportunities.

Speakers:

**Desi Franklin**, Chair of Board of Directors, Workforce Investment Network (WIN)  
**Julie Sanon**, COO, Agape  
**Rob Brown**, Fellow, The Collective  
**Ron Wade**, Executive Director, Hopeworks  
**Deandre Brown**, Executive Director, Lifeline to Success  
**Alexandria Smith**, Former Opportunity Youth, City of Memphis

11:45 – 12:00 PM    Travel to University of Memphis

12:00 – 1:30 PM    Lunch Session: T-STEM meeting  
*University of Memphis' FedEx Institute of Technology*  
*365 Innovation Dr. Memphis, TN 38152*

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Working lunch where staff will hear from representatives from postsecondary education on how they are preparing students for Memphis' transportation and logistics industry, discussing the satellite campus, a Transportation, Science, Technology, Engineering and Math (TSTEM) Highschool (that focuses on transportation) and efforts to better recruit students into STEM fields. Speakers will discuss how systems are working together to increase student interest, outcomes and persistence in these fields.

**Dr. Stephanie Ivey**, Fellow and Professor, University of Memphis  
**Danielle Schnonbaum**, Director of Research, Greater Memphis Alliance for a Competitive Workforce (GMAC)

Travel to Southwest Tennessee Community College Health Campus  
Union Avenue Campus  
737 Union Ave. Memphis, TN 38103

## Preparing Students and Workers for the Healthcare and Biotech Industry

**Dr. J. Racquel Collins**, Graduate School of Biomedical Sciences, St. Jude  
**Dr. Tracy Hall**, President, Southeast Tennessee Community College  
**Beverly Robertson**, Interim President/CEO, Greater Memphis Chamber of Commerce  
**Leslie Smith**, President & CEO, Epicenter Memphis

Wrap Up  
Same location as last panel

Informal discussion with sponsors and staff about key take-aways from the trip – reflecting on what was learned and ways Federal policy makers can assist states and localities to improve system alignment, programming and outcomes.

### Travel to airport



CONGRESSIONAL  
STAFF NETWORK

FOR ECONOMIC ADVANCEMENT

5:30 PM

Return flight to DC

*Memphis → DCA 6:19 – 9:20 PM. American 5539*

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FOR ECONOMIC ADVANCEMENT

Good morning Ryan,

We are writing to invite your participation in an upcoming site visit for Jobs for the Future's (JFF), Lumina Foundation's and the Joyce Foundation's Congressional Staff Network on Economic Advancement. This visit will take place in **Memphis, Tennessee from Thursday, February 21<sup>st</sup> – Friday, February 22<sup>nd</sup>, 2019**. Participants will fly from DC to Memphis on the morning of February 21<sup>st</sup>, participate in meetings and site visits throughout the two days, and then fly back to DC in the late afternoon of February 22<sup>nd</sup>.

In Memphis, staff will learn about how the region is reinventing its workforce and postsecondary education systems to address the needs of its high demand industry sectors. We will hear about how Memphis is creating pathway opportunities, starting in high school, in these high demand fields of study. We will also learn about how the region is addressing reintegration and poverty alleviation through pathways approaches in SNAP, WIOA Youth and other programs – to ensure equal opportunities for disadvantaged populations.

Memphis provides a very interesting example for staff to see about how federal funding has been used to rethink and reform a region's education and workforce development efforts -- to ensure they are responsive to the skill needs of leading employers. Staff will hear from the Greater Memphis Alliance for a Competitive Workforce (GMAC), a workforce intermediary, about its work to deepen stakeholder connections and build strong college and career pathways with help from federal TAACCCT and America Promise grants. We will hear from leading employers, in transportation/logistics, medical device manufacturing, and healthcare about how they have engaged the community to ensure that education and training efforts in the region are meeting their changing needs. We will talk with education and workforce system providers about the changes they are making to ensure the relevance of training efforts. And we will hear from state initiatives including TN Promise, Pathways Tennessee and Tennessee Reconnect to learn how they are working in Memphis and Shelby County.

In the next week, we will send more information regarding the trip, including a final agenda and the necessary Ethics documentation. We hope you can join us!

Mary Clagett

Mary Clagett, Senior Director of Workforce Policy, JFF  
January 14, 2019

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